

Special Report: Is Strategic Planning Dead?

High-Stakes Innovation[⚡]

⚡ **Your Game-Changing
Strategy**

⚡ **12 Personas of a
High-Stakes Facilitator**

⚡ **Strategic Planning
Assessment**

STAGNATION
COST

CONTINUOUS
INNOVATION

**Strategy
Issue!**

GO

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These articles and our customized innovation programs can equip you with powerful tools to help your team generate more profitable ideas and produce tangible results.

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SPECIAL REPORT:
*Is Strategic Planning
Dead?*

got strategy?

From the Editor:

YOUR GAME- CHANGING STRATEGY



Chess and Monopoly® ... two classic games of strategy. Two different sets of rules, playing pieces, and boards.

So, why is there a Queen chess piece sitting on one of the world's most popular board games?

Because this photo is a fitting example of the strange changes taking place in the world of business. Take a moment and ask yourself ...

What if the Queen became a playing piece in Monopoly® and was able to capture other players and move in any direction? What if all the "empty space" in the middle of a Monopoly® board became available "real estate"? Would these changes affect your strategy?

What we're seeing in business today are many new "players" entering old industries and boldly challenging the status quo. These aren't always new companies, but sometimes just revolutionary new products/services. The new players aren't interested in the old rules, traditions, and practices of the past. They are working hard to disrupt and change the old ways with better (and/or different) offerings in order to gain new clients and markets.

For example, look what Apple did to the:

- music industry by creating the iPod®. They revolutionized the music industry by becoming the world's largest music distribution company.
- smart phone industry by creating the iPhone®. They catalyzed the mobile application market and unleashed a creative juggernaut.
- tablet industry by creating the iPad®. They energized the tablet market by creating a "remarkable" product and broke sales records for this historically struggling category.

(Continued on facing page.)

Monopoly® is a registered trademark of Parker Brothers, a subsidiary of Hasbro
iPod®, iPhone®, iPad® are registered trademarks of Apple, Inc.

Reflect for a moment about how just one company created such disruptive, game-changing havoc AND generated such enthusiasm and profits.

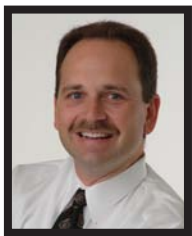
The BIG question is: *What would it be worth to discover and execute your own game-changing strategy?*

Honestly, I don't know many business professionals who view their work as a game. Most are serious about their business and the results they produce.

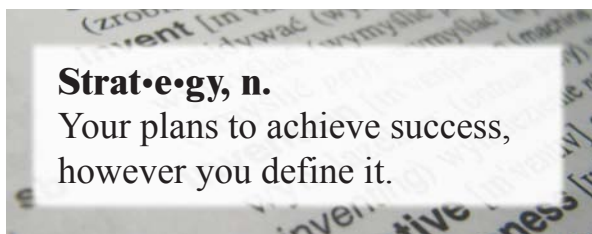
Yet, in business life there are daily examples of victory and defeat, rules and regulations, as well as players and strategies.

Although the game metaphor isn't always accurate for business, it is helpful to use "game theory" to spark new perspectives about strategy.

So, get your strategy game on and make something good happen! Let me know how I can help!



John Storm, *The Innovation Strategist*
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25 Strategic Questions To Ask About Your Strategy

Use these 25 questions to provoke your team to think strategically about your strategy.

1. What is the VALUE of strategy?
2. How clearly can we define, identify, and communicate our strategy?
3. What specific outcomes are at stake if we don't select an effective strategy?
4. What are the measures we currently use to determine if our strategy is successful?
5. What are the measures we should consider to determine if our future strategy is successful?
6. What timeframes should we use to evaluate the results of our strategy?
7. How is our strategy different from our competitors?
8. How much of our resources should we devote to being aware of our competitor's strategy?
9. How much time, energy, and money can we afford to invest in our strategy development?
10. What are the best strategies for us to consider?
11. What are the worst strategies that we should avoid?
12. How is our strategy different than our tactics?
13. Which stakeholders should have a voice in creating our strategy?
14. What other companies outside of our industry have a compelling and effective strategy?
15. Will their strategies "work" within our industry?
16. If we started fresh today and wanted to change the game in our industry, what would we do?
17. What are the biggest dangers to our current strategy?
18. What trends can we forecast that may affect our strategy in good and/or bad ways?
19. What historical examples of good and bad strategy can help us design and develop our strategy?
20. What communication strategies can we use to share our strategy with our stakeholders?
21. Are we confident that ALL of our stakeholders know what our strategy is?
22. What metaphors can we find that visually and intellectually summarize our strategy?
23. What are powerful stories we can use to effectively communicate with our stakeholders?
24. What resources are available to help our leadership and steering teams develop our strategy?
25. What outsiders should we recruit to collaborate with us in our strategy development?

DON'T JUST DO SOMETHING...

S.I.T. THERE!



“Don’t just sit there, do something!”

You’ve probably heard this phrase uttered (i.e. screamed) from frustrated managers to their employees. It is usually followed by a sincere, yet pathetically feeble attempt to look busy while pretending that “doing something” will help. Yet, success ultimately depends on the “something” that we do, not a flurry of misguided activity.

With today’s grim economic realities, most people and companies are running scared, frantically “doing something” without strategic, thoughtful, calculated evaluations of their plans and actions.

Certainly, I believe this IS the time for Massive Action.

However, I’m advocating a counter-intuitive approach to the natural tendency to “get busy”. Massive Action is great, but **WHAT** you do is more important than **WHEN** you do it.

My contrarian mantra is: “Don’t just **DO** something, **S.I.T.** there!” And being the smart reader you are, you can smell an acronym coming from a mile (or kilometer) away. **S.I.T.** is my 3-step plan for Massive Action:

1. STRATEGIZE.

The first step involves digging down to the core issues and getting clarity about **WHY** and **WHAT** you want to do. The key is to become (or hire) a *Strategic Questioneer*—someone who knows how to craft provocative questions

Many companies are sticking their heads in the sand, hoping that **CHANGE will go away. It won’t. In fact, it’s coming **FASTER** than ever.**

that get past your cliché-ridden, top-of-mind, cookie cutter answers. Great strategy comes from being clear about the results you seek, the trends and technologies

that will affect them, and the people and resources needed to produce a successful outcome.

Many companies are sticking their heads in the sand, hoping that **CHANGE** will go away. It won’t. In fact, it’s coming **FASTER** than ever.

Look how fast the banking, music, and real estate industries have changed. What’s next?...your business!

2. INNOVATE.

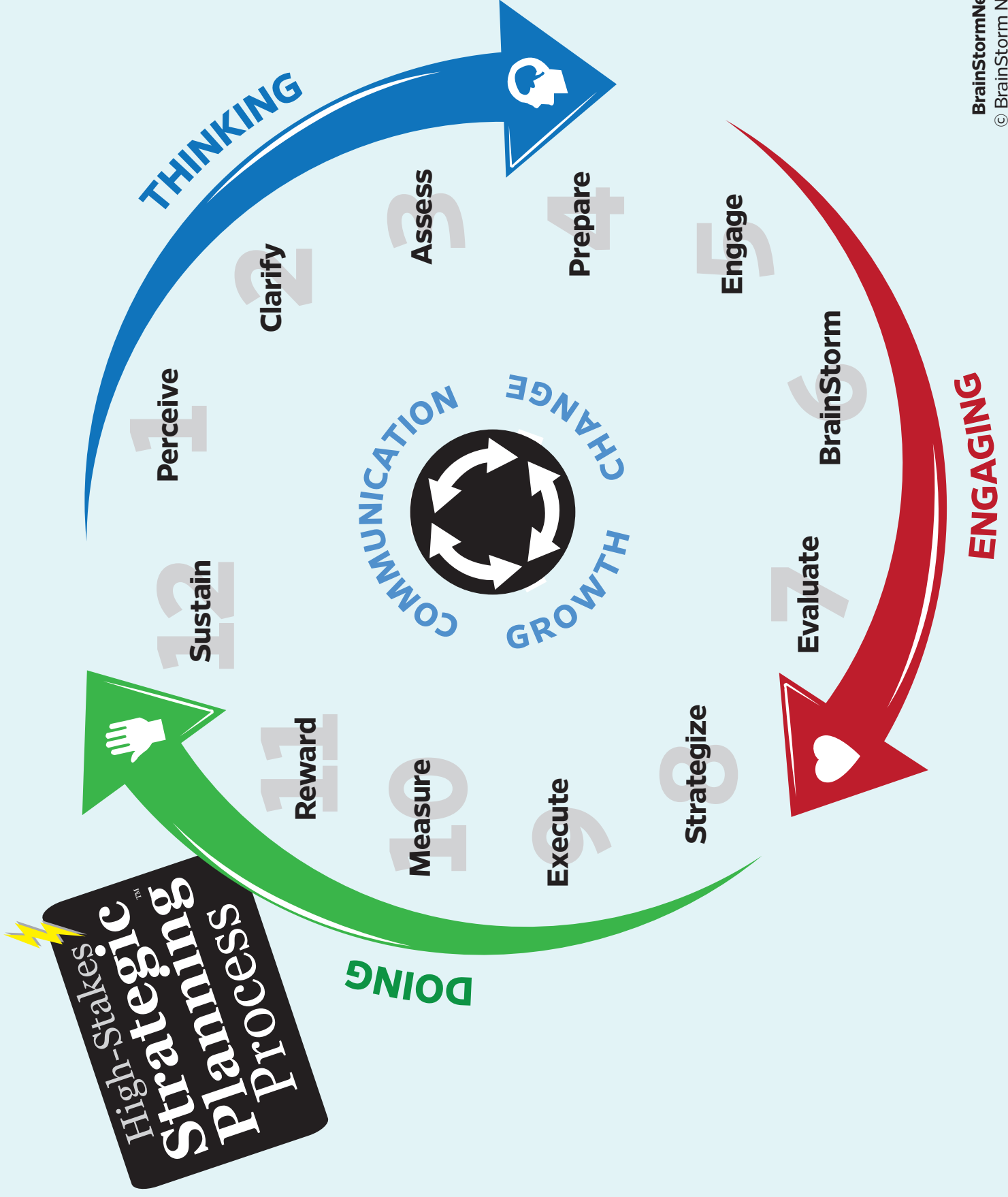
Make a list of every company element/process you can innovate (i.e. products, services, distribution, purchasing, marketing, etc.). Plan a company-wide *TeamStorming™* event to harvest their ideas. Ask your team to share their ideas about: 1. What’s the stupidest thing we’re doing, and why? 2. How can we save time/money? 3. How can we make money? Be prepared for their honest feedback.

Remember you’re looking for both Micro (incremental) and Macro (revolutionary) ideas, some which can be acted on immediately, and some which will take more time. Think about your idea evaluation process (who, how, criteria, budget, communication plan, etc.). Think about the pros/cons of anonymity, incentives for best ideas, transparency, management reaction, etc. Categorize and combine the ideas, eliminate duplicates, and select the top 1-3 ideas within each area as the “idea skeleton”. Then, assemble cross-functional teams to add the vital organs and muscle as they flesh out each idea and develop a plan.

3. TAKE ACTION.

In today’s high velocity world, we can’t wait forever to make the perfect decision. The days of 5-year strategic plans are long gone, replaced by a rapid evolutionary process. Once you are clear about your ultimate goals, you must take massive action, knowing you’ll make mistakes along the way. The process of testing, risking, failing, evaluating, and continually improving is the new norm for strategic action. Just be sure you know **WHY** you are doing what you’re doing and what the **BENEFITS** are for your customers.

So, take this new twist on the old rebuke and ***Don’t Just Do Something, S.I.T. there!***



THE 12 PERSONAS

OF A HIGH-STAKES FACILITATOR

Ever wonder what you need to look for when hiring a facilitator for a high-stakes business meeting?

With all of the sheer chutzpah, conflicting agendas, and different personalities involved, as well as what's at stake IF things don't go well, it's wise to be extremely CONFIDENT that your facilitator knows (and is prepared for) the importance of their role.

A High Stakes Facilitator must be able to seamlessly move from role to role.

Use these 12 Personas as a checklist to mark the roles you feel are most needed to facilitate your company's High-Stakes events:

☐ 1. BATTLE STRATEGIST

No one goes into battle without a plan. The objectives must be clear. The supplies must be ready. The troops must be prepared. The enemies must be known. In high stakes situations, the enemies are usually time, tangents, and emotions (fear, despair, frustration). Knowing how to overcome these meeting-killers is critical to the session's success.

☐ 2. RULE MAKER

A high-stakes facilitator MUST design, establish, and gain FULL buy-in from ALL participants BEFORE the session starts. This is the ONLY way to maintain meeting control if things start to go south.

☐ 3. AGENT PROVOCATEUR

An effective facilitator provokes through great questions that don't personally threaten the participants, yet prods them to re-think their assumptions, experiences and positions. Moving beyond trite, well-worn cliché solutions is dramatically important.

☐ 4. TIME SHIFTER

A high-stakes facilitator must know how to expand and contract time by using subtle interventions, tactful re-direction, and productive meeting management 'tricks' that still leave participants engaged and feeling valued.



Agent Provocateur

Wise Sage

Animal Wrangler

Battle Strategist

Circus Performer

Value Assessor

☐ 5. VALUE ASSESSOR

A valuable facilitator must know and assess what's really at stake: loss of market share, momentum, and/or shareholder confidence; damaging PR; fast-breaking opportunities; and/or team meltdown. Plus, recognizing the cost of the time and energy of the meeting participants far outweighs the cost of the facilitator. That's why he/she **MUST** be a good steward of the team's time.



☐ 6. CIRCUS PERFORMER

High-stakes facilitations require the flexibility and discipline of a gymnast, the balance and concentration of a tight rope walker, and the timing and focus of a trapeze artist. Physical stamina and fitness also play a key role – you can't have your facilitator out carousing all night before the big event... especially if they're the one responsible for "catching" the other performer's ideas. "Active listening" and focused facilitation require great concentration.



☐ 7. ANIMAL WRANGLER

Lots of animals show up during high stakes meetings – rabbits begging to be chased, tigers teasing you to grab them by the tail, monstrous elephants hiding in the room, deer staring in the headlights, and gnats of distraction flying everywhere. A great facilitator knows how to "wrangle" these animals and actually use them to spur the meeting to greater results.



☐ 8. INTUITIVE INTERPRETER

Being able to 'read between the lines', assess non-verbal cues, translate from abstract to concrete, and ask for clarification on fuzzy input is essential. Knowing how/when to repeat, re-phrase, and/or re-frame the input is an essential art form.



☐ 9. IMPARTIAL REFEREE

An experienced facilitator possesses the wisdom to know when to let the team 'fight it out' within the established rules. Conflict can be a powerfully effective driver when managed in a way that is fruitfully focused, impartially managed, and devoid of personal attack.

☐ 10. WISE SAGE

The wise facilitator knows their primary role is to draw out the input of the team members. Yet, there are times the facilitator should share from their broad, multi-faceted life and business experiences. He/she should have proven business acumen and intellectual firepower, so that when they speak, you can expect profound insight.

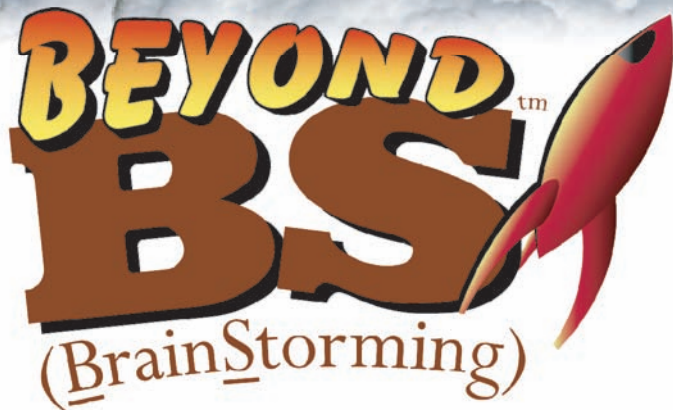
☐ 11. PROCESS LEADER

High-Stakes meetings require a delicate balance between strategic issues and tactical decisions. A seasoned facilitator knows how to 'manage' the meeting process in a way that inspires transparency and confidence, while focusing on getting things done. Knowing how to 'capture the content' for future reporting, discussions and decisions should be seamless and non-distracting.

☐ 12. GENUINE HUMAN BEING

A warm and genuine facilitator who is upbeat, energetic, and professional will be an asset to accomplishing your meeting goals. Someone who models transparency, is gregarious and comfortable to be around, yet able to disagree without being disagreeable. Hiring someone who enjoys encouraging people (and their businesses) to grow through blending their personal and professional lives, skills, and stories will prove to be a valuable benefit.

John Storm focuses on providing professional facilitation for High-Stakes events, including corporate strategic thinking/ strategic planning meetings and retreats. For information, email Personas@BrainStormNetwork.com or call (405) 321-6262.



Innovation & BrainStorming Training

Perfect for

- Marketing Initiatives (Ad Campaigns, Product Naming, etc.)
- Strategic Thinking and Planning Sessions
- Corporate, Sales, & Marketing Meetings / Retreats
- Manager and Employee Skill Training

The Problem with BrainStorming

MANY people think "BrainStorming" is BS! Why? Because they've participated in such pathetic brainstorming sessions and seen so few results. Domineering colleagues, secret agendas, pitiful preparation, aimless wandering, stale topics, inefficient methods, poorly trained facilitators, lnnnnnnng meetings, and all for what? NOTHING is often the RESULT of these "innovation" events.

Lots of companies rank "innovation" HIGH on their corporate value list. Yet, when it comes to their own internal brainstorming sessions, they're still stuck in 1950's BS ... thinking that brainstorming is limited to sitting around a conference room table shouting ideas at some poor facilitator who can't write fast enough.

got bs?



The Solution

In reality, there are HUNDREDS of brainstorming tools and techniques. John Storm's stimulating Beyond BS™ program offers a unique opportunity to learn, practice and apply multiple brainstorming resources to generate powerful ideas and solutions for your company's **High-Stakes Issues** and **Million Dollar Problems**.

The Tangible Benefits of Beyond BS™

BASIC BENEFITS

- Overcome the Key Deficiencies of Traditional BrainStorming
- Generate More Profit by Increasing Revenues/Reducing Expenses
- Explore up to 25 Powerful BrainStorming Tools & Techniques
- Maximize Individual, Team, Tribe and Crowd BrainStorming
- Discover New Ways To Capture Ideas and Bring Them to Life!

BONUS BENEFITS

- Learn How to Unleash the Power of **CyberStorming™**
- Design your Company's own "**Perfect (brain)Storm**"
- Discover How to Create an **Atmosphere of Innovation™**
- Overcome the **Biggest BrainStorming Blunders™**
- Profit from the Emerging Trend of **Distributed Innovation™**

The Value

How Much Would it be Worth to Equip Your Team With Cutting-Edge Innovation Tools They Can Use EVERY DAY to Generate More Profitable Ideas?

Formats

- ½ Day Seminar, 1 Day Workshop, 2 Day Retreat

Hire Us!

Contact John Storm for a customized quotation at:

(405) 321-6262

BBS@BrainStormNetwork.com

TO INNOVATION
AND BEYOND™

Human Dynamics™



Change Dynamics™



1. FEAR

Scared enough
they're
COMPELLED to...

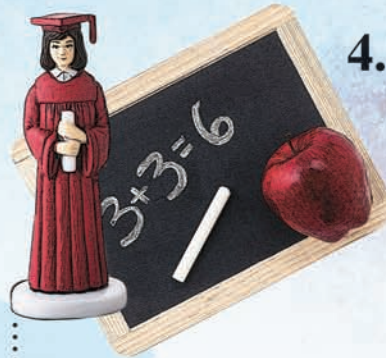
2. PAIN

Hurt enough
they **HAVE** to...



3. PRESSURE

Squeezed enough
they're
FORCED to...



4. EDUCATION

Learn enough
they're **ABLE** to...

5. INCENTIVE

Hungry enough
they **REACH** to...



6. GROWTH

Grow enough
they **WANT** to...



*What are your
primary
motivations to
change, grow or
improve?*



Strategic Planning Facilitation

Perfect for

- Business Strategic Planning Events / Sessions
- Corporate, Sales, Marketing Meetings / Retreats
- Board of Directors / Management Team Retreats
- Strategic Thinking and Vision-Casting Events

The Problem with Traditional Strategic Planning

Nearly every business has a basic strategic plan. Yet, once that plan is in place, they rarely re-examine their process about how to re-vamp, re-engineer, and re-innovate their plan to create game-changing results. MANY companies (and strategic planning facilitators) spend too much time REVIEWING THE PAST, rather than FOCUSING ON THE FUTURE.

"Innovation" ranks HIGH on most corporate values lists, but when it comes to their strategic planning process, they're still stuck using outdated tools (i.e., S.W.O.T.), inefficient techniques, and boring meeting formats.



The Solution to a Stale Strategic Planning Process

We help you re-think, re-invigorate, and re-engage your strategic planning process to go **Beyond Strategy™**. Our facilitation approach serves as an "early stage module" within your overall Strategic Planning process that will help your team look at your problems, challenges, and opportunities through a different framework.

As your strategic planning facilitators, we focus on equipping your people with the mental tools and innovation resources they need to engage and create change pro-actively and positively. Your Return on Innovation (ROI) comes as they generate innovative ideas, develop creative solutions, discover game-changing strategies, and capitalize on emerging opportunities for your **High Stakes Issues**, **Million Dollar Problems**, and **Fast-Breaking Opportunities**.

The Tangible Benefits of Beyond Strategy™

BASIC BENEFITS

- Get your team out of their daily ruts
- Re-think your business and industry mental models
- Identify game-changing business drivers
- Overcome painful strategic planning pitfalls
- Move beyond "past-based" thinking to "zero-based" planning
- Develop communication, benchmarks & accountability systems
- Generate more (>quantity) profitable (>quality) ideas
- Capitalize on emerging/future trends and change

BONUS BENEFITS

- A concrete sense of hope and confidence
- A renewed sense of commitment and enthusiasm
- A genuine sense of accountability and momentum

The Value

How much would it be worth to re-think and re-vision your strategic planning process in order to move beyond strategy to tangible actions that generate game-changing results?

Formats

Customized by client need ranging from half-day "Sparking" sessions to year-long engagements

Hire Us!

Contact John Storm for a customized strategic planning facilitation quotation at:

(405) 321-6262

BSP@BrainStormNetwork.com

got strategy?

Special Report:

Is Strategic Planning Dead?

10 WAYS TO RESURRECT AND RE-THINK YOUR PROCESS



Let's face it ...

Strategic Planning is Dead!

Or at least, in its current form, I think it should be. Put it in the box. Shut the lid. Nail it tight. Drop it in the hole. Bury it.

You're probably thinking ... What do you mean Strategic Planning has bit the dust? Let's get gut-level honest: Aren't you sick of SWOT? Is it possible there might be other systems, tools, programs, and/or techniques that might help your team create your Desired Future? For all the grandiose claims of company "innovation", why is it that many strategic planning sessions are powerfully boring, marginally effective, and consistently unremarkable?

It's easy to get stuck in the same rut as you drive your team down Strategy Street. **Here are 10 ways to mix it up and breathe new life into stagnant strategic planning.** Any one of these ten elements can be explored or tweaked to produce a different set of expectations and results.

INTANGIBLES

#1

PURPOSE: Why do you REALLY do Strategic Planning? Are you honestly using it to guide your daily (or yearly) efforts? Is it a fixed plan or a flexible one? Is it based

on comparison to previous years (historically-based) or is it re-catalyzed every year by new market realities and opportunities (zero-based). Is your strategic planning geared toward providing "lanes" to guide your efforts or more toward providing "targets" to shoot for? What levels of accountability are set up for your team? Is your plan tied into incentive rewards and/or performance evaluations for your team members? Are the resources you are allocating to the strategic planning process in line with its true importance? What can you do to re-invigorate, clarify, and catalyze your Strategic planning process?

#2

PROCESS: Review the #'s. Run through SWOT. Shallow BS (BrainStorming). Harsh evaluation. Choose least risky action items.

Clap 3 times and go home. If your Strategic Planning Process has become this predictable, you risk losing a helpful sense of anticipation, creativity, and optimism from your team. Are you stuck in the same rut year after year? Have you re-analyzed and updated your ground rules and meeting guidelines to overcome known obstacles and streamline communication? Can you experiment with a different mix of models, systems, and tools to re-think your process? What can you do to engage the process at different seasons of your business and harvest the ideas of your "tribe" or the larger "crowd" prior to your actual strategic planning event? What surprising sparks (facts, stories, props, trends, experts, field trips, etc.) can you use to engage your team?

#3 FOCUS: Do your meetings tend to be Past-Based or Future-Based? Do you spend too much time looking in the rearview mirror, reviewing last year or reminiscing about the good old days? What can you do to create a “blank slate” mentality so that your team can have a fresh start? What are your processes for gathering cutting-edge trends and forecasts from a global perspective that could have an impact on your business? What can you do to build anticipation, helping your team to prepare BEFORE the meeting? Can you change your focus from Macro to Micro (or vice versa)? Can you change your focus from hitting homeruns to hitting singles (or vice versa)? Can you change the measures of success in a way that focuses on different metrics (value, impact, stewardship, etc.)? What can you do to combine both Global and Local perspectives?

#4 THEME: Can you experiment with the theme of the strategic planning process? This can range from 1-word themes (i.e. “Shift”, “Transform”, “Envision”) to full campaigns that morph into your company’s annual reporting theme. A good solid theme can set the expectations, the mood, and the results. How can you harvest the great ideas of your team concerning theme creation? How can you plan for Macro and Micro viewpoints? How can you design the theme into natural elements/sub-themes that feed the tone and capture the vision? Should you have a new theme every year or choose one that can provide multi-year focus? Strategic planning is kind of like the old joke about how you eat an elephant ... one bite at a time. How can your theme build company-wide synergy, enhance and deepen relational bonds, and energize the troops (and shareholders)?

#5 EXPERIENCE: What can you do to create a strategic “experience” that pushes your team to new limits, opens their eyes to revolutionary opportunities, and engages them in critical conversations? How can you make the strategic planning process positive, encouraging, and motivating rather than downbeat, tiring, and frustrating? How can all of these elements set the tone to gain momentum, create enthusiasm, and maximize results? What can you do to build pro-active attitudes, collaborative atmospheres, and a bias toward action? What can you do to transform your entire process into a remarkable team-building experience? Is there a way to create a learning experience by including key training elements within the SP process? Is it possible to strategically plan for a better strategic planning process?

TANGIBLES

#6 TEAM: What can you do to broaden your base and involve ALL stakeholder voices (employees, customers, vendors, stockholders, community leaders, etc.) in your strategic planning process? How can you avoid the “Moses Syndrome”? (i.e. the negative effect that occurs when your super elite team comes back from the mountain with suntans and “the Plan”.) Have you seriously invested time in analyzing your team composition? Do you have the right people participating? Is there a strategic mix of old-timers and fresh faces? Is there an eclectic diversity of viewpoints (position, department, tenure, giftmix, age, gender, etc.)? How often do you rotate the responsibilities and rewards of participating on the team? What sub-teams can be formed to “feed the process” and build buy-in prior to the annual



strategic planning meeting? How can you involve smart, confident, win-win minded people (insiders and outsiders) who know little about your past but can serve to provide fresh, outside perspective? What is your plan to cross-pollinate your strategic planning process with people who have different experiences, roles, and viewpoints?

#7 FACILITATOR: Have you grown a bit too comfortable with the person who is guiding your team? Are they still at the top of their game or have they become a bit too comfortable with your team? Are they still digging deep into your issues and uncovering buried treasure? Are they still able to maintain an unbiased distance, while provoking the team to re-think your business? Have they developed new tools to create cognitive dissonance and spark the conversations that need to be had? Can they wrangle the hidden elephants and distracting rabbits into fruitful hunting? Do they have enough intellectual firepower and



multi-industry experience to energize the tone and outcomes? Do they know how to help you set up the process (pre-meeting planning expertise) for maximum results? Do they have a good sense of humor and non-arrogant confidence? Do they truly understand their role and that it's NOT about them, but about YOU? Can they help put your team in challenging situations so that you can evaluate their attitudes, skills, teamwork, and engagement? What other resources (connections, programs, systems, etc.) can they bring to the table beyond their facilitation expertise?

#8 FORMAT: Have you been doing the same 1-2 day format for as long as you can remember? Are your people bored with it? What can you do to change their expectations and stretch their minds to “differently think”? Are you aware of (or willing to experiment with) other formats, tools, philosophies, and/or systems to produce remarkable results? Have you considered combining several different activities (rut-busters, team-building, pure ideation, conflict-resolution, strategic thinking, professional development, along with a burst of re-creational fun)? How can you capitalize on “morning energy” and overcome the afternoon “blahs”? Is participation in the strategic planning process seen as a reward, a privilege, or a burden? What can you do with the format to enhance the reward portion and reduce the burden? Are you using cutting-edge tools to save time, harvest ideas, and manage the process?

#9 TIMING: Should you start the strategic planning process earlier (or later)? Simply mixing things up can produce different results. Are you totally locked into 1 fall/spring meeting with the same group of people? How about expanding the Strategic Planning Process to cover a broader time span? Or can you compact and tighten it up to produce greater

results? Could you split your process up into multiple pieces and spread it out throughout the year? Could you go to a bi-annual process, allowing you to go DEEP during year 1 and WIDE during year 2? Can you combine it with another key company or industry event? How can you use the timing elements (season, cycle, calendar) to shake things up and produce better results?

#10 LOCATION: How can your meeting location affect (positively or negatively) your outcomes? Is your meeting location adding to (or detracting from) the strategic emphasis of your process (i.e. Asian meeting if entering Asian markets)? Does your location choice spark excitement or create distraction? What message does your meeting choice location send about the event's purpose? Do you want (or need) to mix business with pleasure or does this year's meeting need to be “strictly business”? What are the pros and cons of off-sites vs. on-sites? Can you find an unusual meeting place that will enhance the results and enthusiasm? Or can you stay “home” and invest the travel budget savings to create an amazing new in-house “Innovation Center”. Can you find locations that provide a mix of “out of the office” flavor (team-building experiences), along with strategic activities (customer observations/tours, etc.)?



Don't let your Strategic Planning Process meet an untimely death. Capitalize on these 10 life-giving elements and provocative questions to resurrect and re-think your strategic plan. Your team (and your stakeholders) will all benefit from a fresh approach and more productive results.

John Storm can help you go Beyond Strategic Planning™ during your next strategic planning process.

**Email: Info@BrainStormNetwork.com
Phone: (405) 321-6262**

Strategic Planning Assessment

10 WAYS TO RESURRECT AND RE-THINK YOUR PROCESS

INSTRUCTIONS: Use this assessment to identify areas you want to re-evaluate and modify during your next strategic planning process. For each of the 10 elements, put a check mark by the statement which honestly reflects your thoughts. Share the checklist with your team to look for consensus about the most important areas to concentrate on during your next strategic planning process. Record any questions, ideas, and actions you have at the bottom. Then check the boxes beside the elements that you want to investigate and brainstorm about improving.

INTANGIBLES

☐ 1. PURPOSE

- ___ We are confident in the purpose, value, and benefits of strategic planning
- ___ We are unclear as to the purpose, value, and benefits of strategic planning

☐ 2. PROCESS

- ___ We have a clear, yet evolving strategic planning process
- ___ We are stuck in the habits and patterns of the past

☐ 3. FOCUS

- ___ We invest a majority of our time, attention, and resources focused on the future
- ___ We spend way too much time focusing on, explaining, evaluating, and/or defending the past

☐ 4. THEME

- ___ We utilize clear and compelling themes that align with our corporate vision
- ___ We are inconsistent and scattered in our theme selection strategy

☐ 5. EXPERIENCE

- ___ We invest sufficient time and resources to create an engaging and experiential strategic planning process
- ___ We haven't considered the effects/benefits of creating compelling stakeholder experiences during our strategy process

TANGIBLES

☐ 6. TEAM

- ___ We have the right mix of the right people participating in our strategic planning process
- ___ We need to shake up the team composition and expand the number and diversity of people involved

☐ 7. FACILITATOR

- ___ We are confident in our selection of professional facilitators to design, guide, catalyze, and review our process
- ___ We have not invested much time/thought about the effect and value of partnering with professional facilitators

☐ 8. FORMAT

- ___ We regularly shake up our format and are open to experimenting with different meeting formats
- ___ We generally use the same basic format during corporate/department sales, brainstorming and strategy meetings

☐ 9. TIMING

- ___ We continue to experiment with different times and seasons for the various phases of our strategic planning process
- ___ We are stuck in the same timing pattern in our strategic planning process

☐ 10. LOCATION

- ___ We invest significant time and thought behind our choice of meeting locations which produces tangible results
- ___ We haven't invested much mental effort into how our strategy meeting locations will affect our outcomes

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